

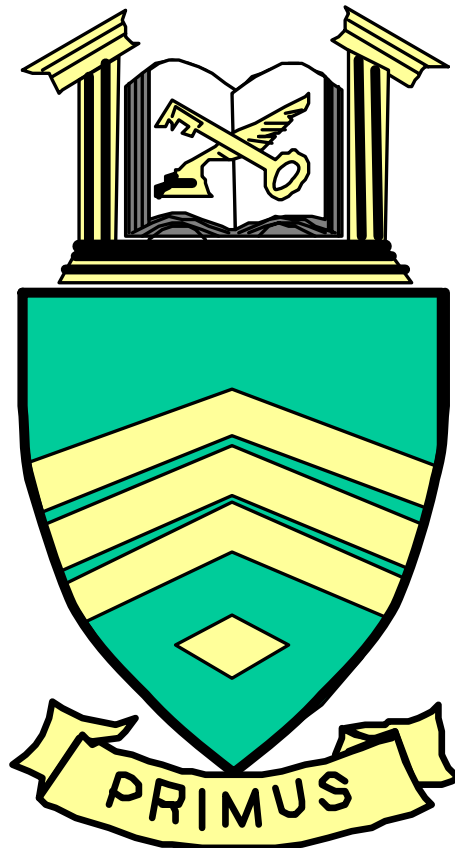
U.S. ARMY SERGEANTS MAJOR ACADEMY (FSC-TATS)

U654

OCT 03

NCO EVALUATION REPORT

TRAINING SUPPORT PACKAGE



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TRAINING SUPPORT PACKAGE (TSP)

TSP Number / Title	U654 / NCO Evaluation Report
Effective Date	01 Oct 2003
Supersedes TSP(s) / Lesson(s)	U654, NCO Evaluation Report, May 01
TSP Users	400-521-SQIM, Phase II, Resident 400-521-SQIM, Phase II, (DL)
Proponent	The proponent for this document is the Sergeants Major Academy.
Improvement Comments	<p>Users are invited to send comments and suggested improvements on DA Form 2028, <i>Recommended Changes to Publications and Blank Forms</i>. Completed forms, or equivalent response, will be mailed or attached to electronic e-mail and transmitted to:</p> <p>COMDT USASMA ATTN ATSS D BLDG 11291 BIGGS FIELD FORT BLISS TX 79918-8002</p> <p>Telephone (Comm): (915) 568-8875 Telephone (DSN): 978-8875</p> <p>e-mail: atss-dcd@bliss.army.mil</p>
Security Clearance / Access	Unclassified
Foreign Disclosure Restrictions	This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.

PREFACE

Purpose

This Training Support Package provides the instructor with a standardized lesson plan for presenting instruction for:

Task Number**Task Title**

400-012-6736

ANALYZE THE NCO EVALUATION REPORTING
SYSTEM

This TSP
Contains

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NCO Evaluation Report (FSC RESIDENT)
U654 / Version 1
01 Oct 2003

SECTION I. ADMINISTRATIVE DATA

All Courses Including This Lesson	<u>Course Number</u>	<u>Version</u>	<u>Course Title</u>
	400-521 SQIM	1	First Sergeant Course - The Army Training System (FSC - TATS)

Task(s) Taught (*) or Supported	<u>Task Number</u>	<u>Task Title</u>
	400-012-6736 (*)	ANALYZE THE NCO EVALUATION REPORTING SYSTEM

Reinforced Task(s)	<u>Task Number</u>	<u>Task Title</u>
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Academic Hours The academic hours required to teach this lesson are as follows:

	<u>Resident Hours/Methods</u>
	2 hrs 5 mins /Conference / Discussion
	45 mins /Practical Exercise (Performance)
Test	0 hrs
Test Review	0 hrs
Total Hours:	3 hrs

Test Lesson Number	<u>Hours</u>	<u>Lesson No.</u>
Testing (to include test review)	_____	N/A

Prerequisite Lesson(s)	<u>Lesson Number</u>	<u>Lesson Title</u>
	None	

Clearance Access	Security Level: Unclassified Requirements: There are no clearance or access requirements for the lesson.
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Foreign Disclosure Restrictions	This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.
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References

<u>Number</u>	<u>Title</u>	<u>Date</u>	<u>Additional Information</u>
AR 623-205	ENLISTED EVALUATION REPORTING SYSTEM	15 May 2002	

Student Study Assignments	Before class--					
	<ul style="list-style-type: none"> Study AR 623-205, Chapters 1 thru 6. 					
	During class--					
	<ul style="list-style-type: none"> Participate in class discussion and practical exercise. 					
	After class--					
	<ul style="list-style-type: none"> Review classroom notes and materials. Turn in recoverable materials. 					
Instructor Requirements	1:14, FSC graduate, served as a 1SG, ITC, SGITC, and VTT-ITC (VTT only) qualified.					
	1:16, At USASMA VTT site for Distance Learning (DL).					
Additional Support Personnel Requirements	<u>Name</u>	<u>Stu Ratio</u>	<u>Qty</u>	<u>Man Hours</u>		
	One site coordinator at each VTT site to operate the TNET equipment and coordinate classroom instruction. Must be FSC grad, served as 1SG, ITC, and SGITC qualified. (Enlisted)	1:16	2	3 hrs		
Equipment Required for Instruction	<u>ID</u> <u>Name</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt</u>	<u>Qty</u>	<u>Exp</u>
	441-06 LCD Projection System	1:14	1:1	No	1	No
	6730-00-577-4813 SCREEN PROJECTION: BM-10	1:14	1:1	No	1	No
	702101T134520 DELL CPU, MONITOR, MOUSE, KEYBOARD	14:14	1:1	No	1	No
	7110-00-T81-1805 DRY ERASE BOARD	1:14	1:1	No	1	No
	7510-01-424-4867 EASEL, (STAND ALONE) WITH PAPER	1:14	1:1	No	1	No
	FSC-1 TNET COMMUNICATIONS EQUIPMENT SUITE (VTT LESSON ONLY)	1:16	1:1	No	1	No
	FSC-2 TNET ROOM EQUIPMENT SUITE (VTT LESSON ONLY)	1:16	1:1	No	1	No
	FSC-3 TNET AUDIO/VIDEO LINKAGE EQUIPMENT (VTT LESSON ONLY)	1:16	1:1	No	1	No
	SNV1240262544393 36 - INCH COLOR MONITOR W/REMOTE CONTROL AND LUXOR STAND	1:14	1:1	No	1	No
	SOFTWARE-2 WINDOWS XP, LATEST GOVERNMENT APPROVED VERSION	14:14	1:1	No	1	No
	* Before Id indicates a TADSS					

**Materials
Required****Instructor Materials:**

- VGTs: 17.
- TSP.
- AR 623-205.

Student Materials:

- Pen or pencil and writing paper.
- All reference material issued for this lesson.
- AR 623-205.

**Classroom,
Training Area,
and Range
Requirements**

CLASSROOM XXI WITH T-NET CAPABILITY (VTT)
CLASSROOM, GENERAL PURPOSE, 600 SF, 16 PN

**Ammunition
Requirements**

<u>Id</u>	<u>Name</u>	<u>Exp</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt Qty</u>
None					

**Instructional
Guidance**

NOTE: Before presenting this lesson, instructors must thoroughly prepare by studying this lesson and identified reference material.

Before class--

- Conduct this lesson using the small group instruction process and use the questions provided to generate discussion among the students at the different sites.
- Read all TSP material.
- Issue AR 623-205.

During class--

- Cover all learning objectives.
- The facilitator may need to create additional questions to ensure student participation continues throughout the lesson material.
- The DL (VTT) instructor will select an appropriate site prior to asking a student a question.

After class--

- Collect recoverable material.
- Report any lesson discrepancies to the Senior Instructor.

**Proponent
Lesson Plan
Approvals**

<u>Name</u>	<u>Rank</u>	<u>Position</u>	<u>Date</u>
Colyer, Donald J.	GS09	Training Specialist	
Graham, Kevin L.	MSG	Course Chief, FSC	
Gratton, Steven M.	SGM	Chief, Functional Courses	
Mays, Albert J.	SGM	Chief, CDDD	

SECTION II. INTRODUCTION

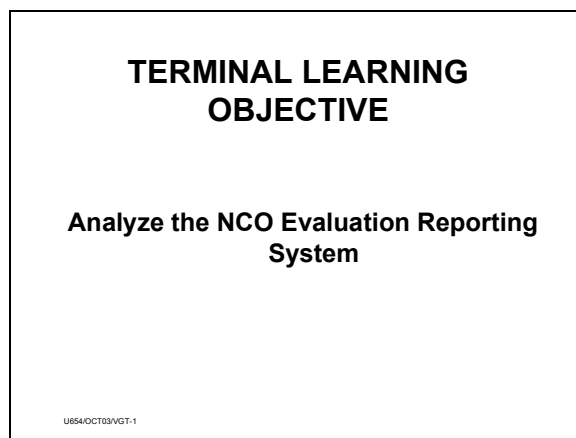
Method of Instruction: Conference / Discussion
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio is: 1:14
Time of Instruction: 5 mins
Media: VGT-1

Motivator

NOTE: Main camera on the instructor. Check each Distance Learning site to ensure they have prepared for training.

As a first sergeant, one of the most important forms that you will come in contact with is DA Form 2166-8, NCO Evaluation Report. The accurate and timely submission of all evaluation reports is important. Failure to properly administer these reports can impact on a noncommissioned officer's assignment, promotion, and selection for military schooling.

SHOW VGT-1, TERMINAL LEARNING OBJECTIVE



REMOVE VGT-1

Terminal Learning Objective

NOTE: Inform the students of the following Terminal Learning Objective requirements.
At the completion of this lesson, you [the student] will:

Action:	Analyze the NCO Evaluation Reporting System (NCOERS).
Conditions:	As a first sergeant, in a classroom environment, given AR 623-205 and student handouts.
Standards:	Analyzed the NCO Evaluation Reporting System (NCOERS), and pass a scenario based performance examination, to receive a GO (70 percent), you must identify and correct at least 7 of the 10 errors built into items 1 thru 21 of DA Form 2166-8 (NCO-ER), IAW AR 623-205.

**Safety
Requirements**

None

**Risk
Assessment
Level**

Low

**Environmental
Considerations**

NOTE: It is the responsibility of all soldiers and DA civilians to protect the environment from damage.

Evaluation

At the end of this lesson you will receive a scenario based performance examination. To receive a GO (70 percent), you must identify and correct at least 7 of the 10 errors built into items 1 thru 21 of DA Form 2166-7 (NCO-ER).

**Instructional
Lead-In**

None

SECTION III. PRESENTATION

NOTE: Inform the students of the Enabling Learning Objective requirements.

A. ENABLING LEARNING OBJECTIVE

ACTION:	Describe the NCO Evaluation Reporting System (NCOERS).
CONDITIONS:	As a first sergeant, in a classroom environment, given AR 623-205.
STANDARDS:	Described the NCO Evaluation Reporting System IAW AR 623-205.

1. Learning Step / Activity 1. Describe the NCO Evaluation Reporting System (NCO-ERS).

Method of Instruction: Conference / Discussion

Technique of delivery: Small Group Instruction (SGI)

Instructor to Student Ratio: 1:14

Time of Instruction: 15 mins

Media: VGT-2 thru VGT-8

NOTE: Assign each group/site one of the following topics:

1. Objective/ purpose of the NCOES.
2. Commanders' responsibilities.
3. NCO support channel responsibilities.

NOTE: Allow 10 minutes to complete assignment with a 5-minute brief back. Ensure that the students discuss key elements in the lesson guide by paraphrasing the regulatory guidelines.

The very first area that we need to discuss is the noncommissioned officer reporting system (NCOERS).

NOTE: Have each group leader discuss their assignment. Use the following questions to lead the discussion.

QUESTION: (Group 1); what objectives did the Army have in mind when designing the NCOERS?

ANSWER: See VGT-2 and VGT-3.

NOTE: Allow the students time to answer the question before you show them the next two slides.

Ensure that students discuss the following points:

- Emphasizes that values and responsibilities are criteria that provides and reinforces a professional focus for rating.
- Provides the rating chain a view of performance/potential for use in assignments/promotions.

SHOW VGT-2, NCOERS DESIGN OBJECTIVES

**NCOERS DESIGN
OBJECTIVES**

- **Strengthen the ability of the NCO Corps to meet the professional challenges of the future.**
- **Ensure the selection of the best qualified NCOs to serve in positions of increased responsibility.**

U654OCT03/VGT-2

Ref: AR 623-205, p 3, para 1-9a(1) and (2)

REMOVE VGT-2

SHOW VGT-3, NCOERS DESIGN OBJECTIVES (cont)

**NCOERS DESIGN
OBJECTIVES (cont)**

- **Contribute to Army wide improved performance and professional development by increased emphasis on performance counseling.**

U654OCT03/VGT-3

Ref: AR 623-205, p 3, para 1-9a(3)

NOTE: Ensure students discuss increased emphasis on counseling.

REMOVE VGT-3

An integral part of the NCOERS is the NCO-ER. Let's talk a little about the purpose of the NCO-ER.

QUESTION: What are the two related NCO-ER forms and their purposes?

ANSWER: See VGT-4.

SHOW VGT-4, PURPOSE OF DA FORMS 2166-8-1 AND 2166-8

PURPOSE OF DA FORMS 2166-8-1 AND 2166-8

- (DA 2166-8-1) To prepare, conduct, and record performance counseling sessions with rated NCO.
- (DA 2166-8) To provide DA with performance and potential assessments of each rated NCO.
- (DA 2166-8) To ensure sound making of personnel management decisions.

U854OCT03/VGT-4

Ref: AR 623-205, pp 10 and 11, para 3-3 and 3-6b

NOTE: Ensure students discuss the part NCO-ERs play in school, promotion and assignment selection (i.e. USASMA, Drill Sergeant, Recruiter, etc.)

REMOVE VGT-4

Now let's discuss responsibilities for the NCO-ER.

QUESTION: (Group 2), what are the responsibilities of commanders?

ANSWER: See VGT-5, VGT-6, and VGT-7.

NOTE: Allow the students time to answer the question before showing the VGTs.

SHOW VGT-5, COMMANDER'S RESPONSIBILITIES

COMMANDERS' RESPONSIBILITIES (to establish controls)

- AR 623-205 is available to rated NCO and rating officials.
- Rating chains correspond to the chain of command.
- For all except ARNGUS, official rating chains published and distributed to rated NCO.

U854OCT03/VGT-5

Ref: AR 623-205, pp 1 and 2, para 1-4b (1) (a)-(c)

REMOVE VGT-5

SHOW VGT-6, COMMANDERS' RESPONSIBILITIES (cont)

COMMANDERS' RESPONSIBILITIES (cont)

- For ARNGUS, official rating schemes are published and posted.
- Rating official is fully qualified to meet his or her responsibilities.
- Rating officials give timely counseling.
- Reports are prepared by the rating officials designated in published rating scheme.

U854OCT03/VGT-6

Ref: AR 623-205, pp 1 and 2, para 1-4b (1) (d)-(g)

SHOW VGT-7, COMMANDER'S RESPONSIBILITIES (cont)

COMMANDERS' RESPONSIBILITIES (cont)

- Rated NCO provided a copy of completed evaluation report.
- NCOs receive assistance in appeals.
- Reports carefully prepared and submitted on time.
- Performs duties when a report appears illegal, unjust or in violation of this regulation.

U854OCT03/VGT-7

Ref: AR 623-205, pp 1 and 2, para 1-4b (1) (h)-(k)

Of particular note is that the commander has the responsibility to establish controls.

These controls normally belong to the 1SG.

REMOVE VGT-7

QUESTION: What are the minimum requirements charged to the NCO support channel?

ANSWER: See VGT-8.

SHOW VGT-8, DELEGATED RESPONSIBILITIES OF THE NCO SUPPORT CHANNEL



Ref: AR 623-205, p 1, para 1-4b(3)

REMOVE VGT-8

CHECK ON LEARNING:

QUESTION: What are the three NCOERS design objectives?

ANSWER: The design objectives are to:

- a. Strengthen the ability of the NCO corps to meet the professional challenges of the future.
- b. Ensure the selection of the best-qualified NCOs to serve in positions of increased responsibility.
- c. Contribute to Army-wide improved performance and professional development by increased emphasis on performance counseling.

Ref: AR 623-205, p 3, para 1-9a(1), (2), and (3)

QUESTION: What do the commanders charge the NCO support channel to do pertaining to the NCO-ER?

ANSWER: Commanders charge the NCO support channel to:

- a. Ensure quality control of the NCO-ER.
- b. Accuracy of the NCO-ER.
- c. Ensure the timely submission of NCO-ERs.

Ref: AR 623-205, p 1, para 1-4b(3)

B. ENABLING LEARNING OBJECTIVE

ACTION:	Describe the policies and procedures for submission of NCO-ERs.
CONDITIONS:	As a first sergeant, in a classroom environment, given AR 623-205.
STANDARDS:	Described the policies and procedures for submission of NCO-ERs IAW AR 623-205.

1. Learning Step / Activity 1. Describe the policies and procedures for submission of NCO-ERs.

Method of Instruction: Conference / Discussion

Technique of Delivery: Small Group Instruction (SGI)

Instructor to Student Ratio: 1:14

Time of Instruction: 30 mins

Media: VGT-9

QUESTION: What determines the type of NCO Evaluation Report?

ANSWER: The event requiring a report determines the type of report.

Ref: AR 623-205, p 20, para 3-27

NOTE: Emphasize that when you are computing the rating period, February counts as having 30 days.

Let's look at the reports by code and type.

SHOW VGT-9, REPORTS BY CODE AND TYPE

REPORTS BY CODE AND TYPE	
1.	First (Does not apply to Active Army)
2.	Annual
3.	Change of rater
4.	Complete the Record
5.	Relief for Cause
6.	Release from AT/ADT/ADSW/AGR/EAD/TTAD
7.	60-day Rater Option
8.	Senior Rater Option
<small>UR54OCT03/VGT-9</small>	

Ref: AR 623-205, p 23, Table 3-1

NOTE: At the discretion of the instructor, have students select, read and discuss as many of the following paragraphs from AR 623-205, as time permits before the break:

Code 1, First Report:

ARNGUS, page 49, paragraph 4-5
USAR, page 51, paragraph 5-5

Code 2, Annual Report:

AC, page 20, paragraph 3-29
ARNGUS, page 49, paragraph 4-6
USAR, page 51, paragraph 5-6

Code 3, Change of Rater Report:

AC, page 20, paragraph 3-20
ARNGUS, page 50, paragraph 4-8
USAR, page 52, paragraph 5-8

Code 4, Complete the Record:

AC, ARNGUS, and USAR, page 22, paragraph 3-33

NOTE: Rating period has been changed from 6 months to 90 days. (paragraph 3-31.)

Code 5, Relief for Cause:

AC, page 21, paragraph 3-32
ARNGUS, page 50, paragraph 4-7
USAR, page 52, paragraph 5-7

Code 6, Release from AT/ADT/ADSW/AGR/EAD/TTAD:

ARNGUS, page 50, paragraph 4-9
USAR, page 52, paragraph 5-10

Code 7, 60-day Rater Option:

AC, page 22, paragraph 3-35

Code 8, Senior Rater Option:

AC, page 22, paragraph 3-34

REMOVE VGT-9

Break Time: 00:50 to 01:00

2. Learning Step / Activity 2. Describe the policies and procedures for submission of NCO-ERs.
 - Method of Instruction: Conference / Discussion
 - Technique of Delivery: Small Group Instruction (SGI)
 - Instructor to Student Ratio: 1:14
 - Time of Instruction: 20 mins
 - Media: VGT-10 and VGT-11

AR 623-205 also addresses the specific policies and procedures for the Reserve Component soldier (ARNGUS, USAR). Chapter 3 Section V applies to AC, ARNGUS-AGR and USAR-AGR members while chapter 4 applies to the ARNGUS traditional guardsman and chapter 5 applies to the USAR traditional reservist. Keep in mind all other provisions of AR 623-205 apply to ARNGUS and USAR soldiers unless otherwise indicated.

Lets look at the preparation of the DA FORM 2166-8.

NOTE: Have students turn to p 31 of AR 623-205

QUESTION: What are some of the procedural changes that have taken place concerning the preparation of the NCO-ER?

ANSWER: See VGT-10 and VGT-11.

SHOW VGT-10, PROCEDURES

PROCEDURES
<ul style="list-style-type: none">• Part I, Administrative Data.<ul style="list-style-type: none">– Part I a, Name will be capitalized, para 3-7d(1).<ul style="list-style-type: none">• *Rated NCOs e-mail address on page 2, (SH-2, para 3A.)– Part I h, Four-digit numerical identifier for the year, para 3-7d(7).• Part II, Authentication.• Part III, Duty Description.<ul style="list-style-type: none">– Part III d, E-mail address of all three rating officials will be entered on the last line, (SH-2, para 3A and SH-3, para 4).
<small>U654OCT03/VGT-10</small>

NOTE: Show one bullet at a time on VGT-10 and select different students or VTT locations to read the paragraphs from AR 623-205. Have students share personal experiences/lessons learned while preparing an NCO-ER. Ensure students read the paragraphs indicated on the VGT and answer any questions the students might have on Parts I-II.

* Explain that the rated soldiers name will concurrently appear at the top of page 2 as it is typed in Part I a. The e-mail address of the rated soldier must be inserted four spaces from the end of the soldier's last name on page 2.

Ref: AR 623-205, pp 31 and 32

REMOVE VGT-10

SHOW VGT 11, PROCEDURS (cont)

PROCEDURES (cont)

- **Part IV, Army Values/Attributes/Skills/Actions.**
 - **Part IV a.** Addition of Army Values
 - **Part IV c.** "Received APFT badge" justifies an excellent rating, para 3-11a.
- **Part V, Overall Performance and Potential.**

U654OCT03/VGT-11

NOTE: Show one bullet at a time on VGT-11 and select different students or VTT locations to read the paragraphs from AR 623-205. Have students share personal experiences/lessons learned while preparing an NCO-ER. Ensure students read the paragraphs indicated on the VGT and answer any questions the students might have on Parts IV-V.

Ref: AR 623-205, pp 31 and 32

REMOVE VGT 11

CHECK ON LEARNING:

QUESTION: What is the minimum rating period for an AC relief-for-cause NCO-ER?

ANSWER: The minimum rating period is 30 rated days.

Ref: AR 623-205, p 21, para 3-32c(4)

QUESTION: When can you submit a complete-the-record NCO-ER?

ANSWER: At the option of the rater, the rater may submit a Complete-the-Record Report on an NCO who is about to have his records considered by a DA centralized board for promotion, school, or CSM selection.

Ref: AR 623-205, p 22, para 3-33a

C. ENABLING LEARNING OBJECTIVE

ACTION:	Explain the rating chain qualifications and responsibilities for NCO-ERs.
CONDITIONS:	As a first sergeant, in a classroom environment, given AR 623-205.
STANDARDS:	Explained the rating chain qualifications and responsibilities for NCO-ERs IAW AR 623-205.

1. Learning Step / Activity 1. Explain the rating chain qualifications and responsibilities for NCO-ERs.

Method of Instruction: Conference / Discussion
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio: 1:14
Time of Instruction: 15 mins
Media: VGT-12 thru VGT-16

We have discussed the goals of the NCOERS, the responsibilities of the commander and what should be delegated to the NCO support channel. We also discussed the rating period and the types of reports in the NCOERS. We will now discuss qualifications and responsibilities of rating officials.

SHOW VGT-12, RATER QUALIFICATIONS/RESPONSIBILITIES

RATER QUALIFICATIONS / RESPONSIBILITIES

- Immediate supervisor for 90 days
- Sergeant or above and senior
- Counsel rated NCO
- Prepare separate DA Form 2166-8-1
- Assessment of performance
- Prepare fair and correct DA Form 2166-8

UB54OCT03/VGT-12

NOTE: Have students discuss each bullet IAW, AR 623-205, paragraphs 2-4 and 2-9.

Ref: AR 623-205, pp 5 and 6, para 2-4 and p 7, para 2-9

REMOVE VGT-12

SHOW VGT-13, SENIOR RATER QUALIFICATIONS/RESPONSIBILITIES

**SENIOR RATER QUALIFICATIONS
/ RESPONSIBILITIES**

- In direct line of supervision for and designated for minimum of 60 days
- Senior to rater by pay grade or DOR
- Obtain NCO's signature on NCOER

U854OCT03/VGT-13

NOTE: Have students discuss each bullet IAW, AR 623-205, para 2-5, 2-10 and 2-11.

Ref: AR 623-205, p 6, para 2-5 and p 8, para 2-11

REMOVE VGT-13

SHOW VGT-14, REVIEWER QUALIFICATIONS/RESPONSIBILITIES

**REVIEWER
QUALIFICATIONS / RESPONSIBILITIES**

- In direct line of supervision and senior in pay grade or DOR to senior rater
- Ensure rater and senior rater complete the report

U854OCT03/VGT-14

NOTE: Have student discuss each bullet IAW AR 623-205, para 2-6, 2-12 and 2-13.

Ref: AR 623-205, p 6, para 2-6, and p 8, para 2-12 and 2-13

REMOVE VGT-14

We will now discuss the qualifications and responsibilities for the ARNGUS and USAR.

NOTE: Refer the students to paragraphs 4-11 and 4-12 for ARNGUS qualifications and responsibilities. Refer the students to paragraphs 5-12, 5-13 and 5-14 for USAR qualifications and responsibilities. Briefly review and explain RC qualifications and responsibilities associated with each item listed on the VGT. One item per Distance Learning site. Allow for student discussion.

SHOW VGT-15, RC QUALIFICATIONS AND RESPONSIBILITIES

RC QUALIFICATIONS AND RESPONSIBILITIES

- **Rater (Non-AGR) para 4-11 and 5-12**
- **Senior rater**
- **Reviewer**

U654/OCT03/VGT-15

NOTE: Have student discuss each bullet IAW AR 623-205, paragraphs 4-11, 4-12, and 5-12 through 5-14.

Ref: AR 623-205, pp 50 through 54, para 4-11, 4-12, 5-12, 5-13 and 5-14

REMOVE VGT-15

A 1SG must review NCO-ERs for correctness and then advise rating officials, who may not be familiar with AR 623-205, on the proper procedures.

NOTE: Have students read scenario 1 on VGT 16 and ask check on learning questions.

SHOW VGT-16, SCENARIO 1

SCENARIO 1

SGT Smith was due an annual NCO-ER last month. Smith's rater completed the NCO-ER but was relieved prior to signing it. Smith's senior rater and reviewer have been the same during the entire rating period.

U654/JAN 02/VGT-16

QUESTION: SGT Smith's rater completed the annual NCO-ER before being relieved. Can his rater sign the report?

ANSWER: No.

Ref: AR 623-205, p 20, para 3-29e(1)

QUESTION: Can Smith's senior rater complete the annual report?

ANSWER: Yes.

Ref: AR 623-205, p 9, para 2-5c(2)

QUESTION: When the senior rater serves as both the rater and senior rater he must enter his information in what two parts of the NCO-ER?

ANSWER: Part IIa and part IIb.

Ref: AR 623-205 p 9, para 2-5c(2)

REMOVE VGT-16

D. ENABLING LEARNING OBJECTIVE

ACTION:	Explain the procedures for appealing a NCO-ER.
CONDITIONS:	As a first sergeant, in a classroom environment, given AR 623-205.
STANDARDS:	Explained the procedures for appealing a NCO-ER IAW AR 623-205.

1. Learning Step / Activity 1. Explain the Procedures for Appealing a NCO-ER

Method of Instruction: Conference / Discussion

Technique of Delivery: Small Group Instruction (SGI)

Instructor to Student Ratio: 1:14

Time of Instruction: 15 mins

Media: VGT-17

NOTE: Refer the students to the reference. Have the students paraphrase the reference to explain the appeals procedure based on each item listed on the VGT. Assign items to DL sites. Allow for student discussion. Emphasize that detailed instructions for constructing an evaluation report appeal is in Appendix F, starting on page 73. Ensure students are aware of Commander's Inquiry procedures, paragraphs 6-3 and 6-4.

Now we will discuss the procedures to appeal an NCO-ER.

QUESTION: What does the Redress Program do for the Army and the NCO?

ANSWER: The Redress Program protects the Army's interest and ensures fairness to the NCO.

Ref: AR 623-205, p 56, para 6-2a

NOTE: Discuss para 6-6, 6-7, 6-8, 6-9, and 6-10.

SHOW VGT-17, APPEALS

APPEALS

- **Evaluation reports and appeals**
- **Timeliness**
- **Processing and resolution**
- **Priorities**
- **Burden of proof and type of evidence**

U854/OCT03/VGT-17

Ref: AR 623-205, pp 57 through 60, para 6-6, 6-7, 6-8, 6-9, and 6-10

REMOVE VGT-17

CHECK ON LEARNING:

QUESTION: Who may initiate an NCO-ER appeal?

ANSWER: The rated NCO or another party who knows the circumstances of a rating may appeal any report that he or she believes is incorrect, inaccurate, or in violation of the intent of AR 623-205.

Ref: AR 623-205, p 57, para 6-6c

QUESTION: What is the timeframe for submission of a substantive NCO-ER appeal?

ANSWER: The timeframe for submission of substantive NCO-ER appeals is within 5 years of the NCO-ER's completion date.

Ref: AR 623-205, p 58, para 6-7b

BREAK: TIME: 01:50 TO 02:00

E. ENABLING LEARNING OBJECTIVE

ACTION:	Discuss the evaluation forms and procedures used to evaluate a NCO.
CONDITIONS:	As a first sergeant, in a classroom environment, given AR 623-205.
STANDARDS:	Discussed the evaluation forms and procedures used to evaluate a NCO IAW AR 623-205.

1. Learning Step / Activity 1. Discuss the Evaluation Forms and Procedures Used to Evaluate a NCO.

Method of Instruction: Practical Exercise (Performance)
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio: 1:14
Time of Instruction: 45 mins
Media: PE-1

NOTE: Instruct students to turn to SH-6-1, Practical Exercise 1, and allow the students 35 minutes to complete the exercise. Issue SPE-1 to the students and allow 10 minutes to discuss the solutions and answer any questions the students have.

CHECK ON LEARNING:

QUESTION: Can the boxes in Part II be marked with a typed "X"?

ANSWER: Yes.

Ref: AR 623-205, para 6-7b and MILPER Message #98-044

SECTION IV. SUMMARY

Method of Instruction: <u>Conference / Discussion</u>
Technique of Delivery: <u>Small Group Instruction (SGI)</u>
Instructor to Student Ratio is: <u>1:14</u>
Time of Instruction: <u>5 mins</u>
Media: <u>None</u>

Check on Learning

The check on learning questions throughout this TSP serve as the check on learning for this TSP.

Review / Summarize Lesson

The first sergeant plays an important role in the evaluation rating system. It is imperative that all NCOs are familiar with their responsibilities for rating other NCOs. The first sergeant must ensure that NCOs receive accurate and timely reports to help guarantee the selection for promotion, assignment, or schooling on the best-qualified NCOs.

SECTION V. STUDENT EVALUATION

Testing Requirements

NOTE: Describe how the student must demonstrate accomplishment of the TLO. Refer student to the Student Evaluation Plan.

We will evaluate your mastery of this material by means of a scenario-based performance examination. To receive a go on this block of instruction, you must identify at least 7 of the 10 errors built into a DA Form 2166-8 (NCO-ER). If you identify a correct entry as incorrect, we will deduct 10 points for each occurrence. If your correction of a built-in error is incorrect, we will deduct 10 points for each occurrence.

Feedback Requirements

NOTE: Feedback is essential to effective learning. Schedule and provide feedback on the evaluation and any information to help answer students' questions about the test. Provide remedial training as needed.

You will participate in an After Action Review (AAR) immediately following the examination for this particular lesson.

Terminal Learning Objective

VGT-1, Terminal Learning Objective

**TERMINAL LEARNING
OBJECTIVE**

**Analyze the NCO Evaluation Reporting
System**

U654/OCT03/VGT-1

Enabling Learning Objective A

Learning Step 1

VGT-2, NCOERS Design Objectives

NCOERS DESIGN OBJECTIVES

- **Strengthen the ability of the NCO Corps to meet the professional challenges of the future.**
- **Ensure the selection of the best qualified NCOs to serve in positions of increased responsibility.**

U654/OCT03/VGT-2

NCOERS DESIGN OBJECTIVES (cont)

- **Contribute to Army wide improved performance and professional development by increased emphasis on performance counseling.**

U654/OCT03/VGT-3

PURPOSE OF DA FORMS 2166-8-1 AND 2166-8

- **(DA 2166-8-1) To prepare, conduct, and record performance counseling sessions with rated NCO.**
- **(DA 2166-8) To provide DA with performance and potential assessments of each rated NCO.**
- **(DA 2166-8) To ensure sound making of personnel management decisions.**

U654/OCT03/VGT-4

COMMANDERS' RESPONSIBILITIES (to establish controls)

- **AR 623-205 is available to rated NCO and rating officials.**
- **Rating chains correspond to the chain of command.**
- **For all except ARNGUS, official rating chains published and distributed to rated NCO.**

U654/OCT03/VGT-5

COMMANDERS' RESPONSIBILITIES (cont)

- **For ARNGUS, official rating schemes are published and posted.**
- **Rating official is fully qualified to meet his or her responsibilities.**
- **Rating officials give timely counseling.**
- **Reports are prepared by the rating officials designated in published rating scheme.**

U654/OCT03/VGT-6

COMMANDERS' RESPONSIBILITIES (cont)

- **Rated NCO provided a copy of completed evaluation report.**
- **NCOs receive assistance in appeals.**
- **Reports carefully prepared and submitted on time.**
- **Performs duties when a report appears illegal, unjust or in violation of this regulation.**

U654/OCT03/VGT-7

DELEGATED RESPONSIBILITIES OF THE NCO SUPPORT CHANNEL

- **Quality control**
- **Accuracy**
- **Submitted on time**

U654/OCT03/VGT-8

Enabling Learning Objective B

Learning Step 1

VGT-9, Reports by Code and Type

**REPORTS
BY CODE AND TYPE**

- 1. First (Does not apply to Active Army)**
- 2. Annual**
- 3. Change of rater**
- 4. Complete the Record**
- 5. Relief for Cause**
- 6. Release from AT/ADT/ADSW/AGR/EAD/TTAD**
- 7. 60-day Rater Option**
- 8. Senior Rater Option**

U654/OCT03/VGT-9

PROCEDURES

- **Part I, Administrative Data.**
 - **Part I a**, Name will be capitalized, para 3-7d(1).
 - *Rated NCOs e-mail address on page 2, (SH-2, para 3A.)
 - **Part I h**, Four-digit numerical identifier for the year, para 3-7d(7).
- **Part II, Authentication.**
- **Part III, Duty Description.**
 - **Part III d**, E-mail address of all three rating officials will be entered on the last line, (SH-2, para 3A and SH-3, para 4).

U654/OCT03/VGT-10

PROCEDURES (cont)

- **Part IV, Army Values/Attributes/Skills/Actions.**
 - **Part IV a, Addition of Army Values**
 - **Part IV c, “Received APFT badge” justifies an excellent rating, para 3-11a.**
- **Part V, Overall Performance and Potential.**

U654/OCT03/VGT-11

Enabling Learning Objective C

Learning Step 1

VGT-12, Rater Qualifications/Responsibilities

RATER QUALIFICATIONS / RESPONSIBILITIES

- **Immediate supervisor for 90 days**
- **Sergeant or above and senior**
- **Counsel rated NCO**
- **Prepare separate DA Form 2166-8-1**
- **Assessment of performance**
- **Prepare fair and correct DA Form 2166-8**

U654/OCT03/VGT-12

SENIOR RATER QUALIFICATIONS / RESPONSIBILITIES

- **In direct line of supervision for and designated for minimum of 60 days**
- **Senior to rater by pay grade or DOR**
- **Obtain NCO's signature on NCOER**

U654/OCT03/VGT-13

REVIEWER QUALIFICATIONS / RESPONSIBILITIES

- **In direct line of supervision and senior in pay grade or DOR to senior rater**
- **Ensure rater and senior rater complete the report**

U654/OCT03/VGT-14

RC QUALIFICATIONS AND RESPONSIBILITIES

- **Rater (Non-AGR) para 4-11 and 5-12**
- **Senior rater**
- **Reviewer**

U654/OCT03/VGT-15

SCENARIO 1

SGT Smith was due an annual NCO-ER last month. Smith's rater completed the NCO-ER but was relieved prior to signing it. Smith's senior rater and reviewer have been the same during the entire rating period.

U654/OCT03/VGT-16

APPEALS

- **Evaluation reports and appeals**
- **Timeliness**
- **Processing and resolution**
- **Priorities**
- **Burden of proof and type of evidence**

U654/OCT03/VGT-17

Appendix B Test(s) and Test Solution(s) (N/A)

PRACTICAL EXERCISE SHEET PE-1

Title	NCO Evaluation Report		
Lesson Number/Title	U654 version 1 / NCO Evaluation Report (FSC RESIDENT)		
Introduction	This practical exercise will help you understand how to ensure that the NCO-ERs submitted by your company are accurate and timely and helps guarantee selection for assignment, promotion, or schooling for your NCOs.		
Motivator	As the first sergeant in your company, battery, or troop, you are responsible for the quality control of all NCO-ERs. This PE gives you the opportunity to practice skills necessary for quality control.		
Learning Step/Activity	<p>NOTE: The instructor should inform the students of the following Learning Step/Activity requirements. (ELO E.1)</p> <p>At the completion of this lesson, you [the student] will:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Action:</td><td>Discuss the Evaluation Forms and Procedures Used to Evaluate a NCO.</td></tr> </table>	Action:	Discuss the Evaluation Forms and Procedures Used to Evaluate a NCO.
Action:	Discuss the Evaluation Forms and Procedures Used to Evaluate a NCO.		
Safety Requirements	None		
Risk Assessment Level	Low		
Environmental Considerations	None		
Evaluation	This is a self-graded practical exercise. Your instructor will provide you with a copy of the solution sheet and feedback on your performance.		
Instructional Lead-In	None		
Resource Requirements	<p>Instructor Materials:</p> <ul style="list-style-type: none"> • AR 635-200. • Solution to PE. <p>Student Materials:</p> <ul style="list-style-type: none"> • Paper, pencil, and AR 623-205. • SH-6-1 through SH-6-7. 		
Special Instructions	This exercise will determine your grasp of the information presented in this lesson. Complete this exercise on your own. Refer to the situation below for detailed information. You will have 35 minutes to complete the exercise and 10 minutes to check your solution with the solution to the practical exercise (SPE) that the site coordinator will provide for you.		

Procedures

Read over the situation assigned to you. Use the knowledge that you gained while participating in the lesson and the reading material in the Student Handouts to assess the situation in the practical exercise.

- a. You may use the reference material to complete the PE. The instructor will hold a discussion to evaluate the results.
- b. Use Practical Exercise Requirement Sheets, SH-6-1 thru SH-6-7 to complete the exercise.
- c. The performance evaluation for this task consists of identifying the errors in an NCO-ER.
- d. Students will participate in a discussion of their solutions.

Title: NCO EVALUATION REPORT

Situation:

You are the first sergeant; Company A, 52D INF DIV (MECH), Fort Daisy, CO 79875-0123. The unit policy requires the first sergeant to review all NCO-ERs prior to submission to PAC. You are reviewing an NCO-ER pertaining to SSG William R. Smith, a soldier (ARNG-AGR) in your unit. After reviewing, you'll forward to your local personnel office for correction/signatures. The following information about SSG Smith is available to you:

- a. Highest civilian education: High School (GED).
- b. PMOS: 11B30.
- c. SSN: 123-45-9876.
- d. Date of assignment: 8 Dec 90.
- e. Highest military award: Army Commendation Medal.
- f. Date of last APFT and score: 15 Dec 92, 268.
- g. Height/Weight: 66 inches, 160 pounds, (SSG Smith meets the screening table weight IAW AR 600-9).
- h. Date of rank: 1 May 89.
- i. Appointed duties: Equal Opportunity Representative.
- j. Highest military education: BNCOC.
- k. Rater: SFC Rodney B. Ware, 573-22-1974, 11B40, Platoon Sergeant.
- l. Senior rater: 2LT Frederick L. Bahm, Infantry, 359-01-6349, Platoon Leader.

- m. Reviewer: CPT John A. Franco, Infantry, 634-23-7519, Commander.
- n. UMR information: DMOS 11B30, Squad Leader.
- o. Area of Special emphasis: Preparation for the National Training Center.
- p. Counseling dates: 5 Nov 92 and 8 Feb 93.
- q. Ending date of last report: 9210.
- r. Recommended positions: Operations sergeant, Team sergeant, and Platoon sergeant.
- s. The reviewer concurs with rater and senior rater evaluations.

Requirement:

Identify the errors (e. g. wrong dates, bullets do not justify...) pertaining to SSG Smith's NCO-ER using references issued to you. Indicate the correct information for each identified error or the specific reason the information is incorrect. There are a total of 19 errors on this practical exercise.

**Feedback
Requirements**

None

SOLUTION FOR PRACTICAL EXERCISE PE-1

NCO EVALUATION REPORT For use of this form, see AR 623-205; the proponent agency is OCS/SPR.						SEE PRIVACY ACT STATEMENT IN AR 623-205, APPENDIX C		
PART I - ADMINISTRATIVE DATA								
a. NAME (Last, First, Middle Initial)				b. SSN 123-45-9876		c. RANK		
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND				d. DATE OF RANK 890501		e. PMOSBC		
				g. REASON FOR SUBMISSION 2				
h. PERIOD COVERED		i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL.	l. RATED NCO COPY (Check one and Date)		m. PSC Initials	
FROM YYYY MM 1992 11	THRU YYYY MM 1993 10				1. Given to NCO 2. Forwarded to NCO		n. CVD CODE	
					Date		o. PSB CODE	
PART II - AUTHENTICATION								
a. NAME OF RATER (Last, First, Middle Initial) WARE, RODNEY B. (First name misspelled)				SSN		SIGNATURE		
RANK, PMOS, BRANCH, ORGANIZATION, DUTY ASSIGNMENT						DATE		
b. NAME OF SENIOR RATER (Last, First, Middle Initial)				SSN		SIGNATURE		
RANK, PMOS, BRANCH, ORGANIZATION, DUTY ASSIGNMENT						DATE		
c. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating officials in Part II, the duty description to include the counseling dates in Part III, and the APFT and height/weight entries in Part IVc are correct. I have seen the report completed through Part V, except Parts IId and IIe. I am aware of the appeals process of AR 623-205.				SIGNATURE		DATE		
d. NAME OF REVIEWER (Last, First, Middle Initial)				SSN		SIGNATURE		
RANK, PMOS, BRANCH, ORGANIZATION, DUTY ASSIGNMENT						DATE		
e. <input checked="" type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS <input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL. (See attached comments)								
PART III - DUTY DESCRIPTION (Rater)								
a. PRINCIPAL DUTY TITLE				b. DUTY MOSC 11B30				
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities and dollars)								
d. AREAS OF SPECIAL EMPHASIS Preparation for the National Training Center.								
e. APPOINTED DUTIES Equal Opportunity Representative.								
f. COUNSELING DATES				INITIAL 921105	LATER 930208	LATER	LATER	
PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)								
a. ARMY VALUES. Check either "YES" or "NO". Comments are mandatory for "No" entries; optional for "Yes" entries.							YES	NO
<div style="display: flex; align-items: center;"> <div style="font-size: 4em; margin-right: 10px;">V A L U E S</div> <div> Loyalty Duty Respect Selfless Service Honor Integrity Personal Courage </div> </div>								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
								<input checked="" type="checkbox"/>
1. LOYALTY: Bears true faith and allegiance to the U. S. Constitution, the Army, the unit, and other soldiers. 2. DUTY: Fulfills their obligations. 3. RESPECT/EO/EEQ: Treats people as they should be treated. 4. SELFLESS SERVICE: Puts the welfare of the nation, the Army, and subordinates before their own. 5. HONOR: Lives up to all the Army values. 6. INTEGRITY: Does what is right - legally and morally. 7. PERSONAL COURAGE: Faces fear, danger, or adversity (physical and moral). Bullet comments Item number one requires a comment to justify the "NO" rating.								

RATED NCO'S NAME (Last, First, Middle Initial) +		SSN 123-45-9876	THRU DATE 199310 +
PART IV (Rater) - VALUES/NCO RESPONSIBILITIES <div style="font-size: 0.8em; margin-top: 5px;"> <i>Specific Bullet examples of "EXCELLENCE" or "NEEDS IMPROVEMENT" are mandatory. Specific Bullet examples of "SUCCESS" are optional.</i> </div>			
b. COMPETENCE o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self improvement; always learning o Accomplishing tasks to the fullest capacity; committed to excellence <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> EXCELLENCE <i>(Exceeds std)</i> <input checked="" type="checkbox"/> </div> <div> SUCCESS <i>(Meets std)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Same)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Much)</i> <input type="checkbox"/> </div> </div>	Requires a comment to justify the "EXCELLENCE" rating.		
c. PHYSICAL FITNESS & MILITARY BEARING o Mental and physical toughness o Endurance and stamina to go the distance o Displaying confidence and enthusiasm; looks like a soldier <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> EXCELLENCE <i>(Exceeds std)</i> <input type="checkbox"/> </div> <div> SUCCESS <i>(Meets std)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Same)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Much)</i> <input type="checkbox"/> </div> </div>	APFT	HEIGHT/WEIGHT	
d. LEADERSHIP o Mission first o Genuine concern for soldiers o Instilling the spirit to achieve and win o Setting the example; Be, Know, Do <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> EXCELLENCE <i>(Exceeds std)</i> <input type="checkbox"/> </div> <div> SUCCESS <i>(Meets std)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Same)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Much)</i> <input type="checkbox"/> </div> </div>			
e. TRAINING o Individual and team o Mission focused; performance oriented o Teaching soldiers how; common tasks, duty related skills o Sharing knowledge and experience to fight, survive and win <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> EXCELLENCE <i>(Exceeds std)</i> <input type="checkbox"/> </div> <div> SUCCESS <i>(Meets std)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Same)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Much)</i> <input type="checkbox"/> </div> </div>			
f. RESPONSIBILITY & ACCOUNTABILITY o Care and maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging soldiers to learn and grow o Responsible for good, bad, right & wrong <div style="display: flex; justify-content: space-between; font-size: 0.8em;"> <div> EXCELLENCE <i>(Exceeds std)</i> <input type="checkbox"/> </div> <div> SUCCESS <i>(Meets std)</i> <input type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Same)</i> <input checked="" type="checkbox"/> </div> <div> NEEDS IMPROVEMENT <i>(Much)</i> <input type="checkbox"/> </div> </div>	Requires a comment to justify the "NEEDS IMPROVEMENT" rating.		
PART V - OVERALL PERFORMANCE AND POTENTIAL			
a. RATER Overall potential for promotion and/or service in positions of greater responsibility. <div style="display: flex; justify-content: space-around; font-size: 0.8em;"> <div> AMONG THE BEST <input checked="" type="checkbox"/> </div> <div> FULLY CAPABLE <input type="checkbox"/> </div> <div> MARGINAL <input type="checkbox"/> </div> </div>	e. SENIOR RATER BULLET COMMENTS a. Cannot give a rating of "Among the Best" in Part V due to a "Needs Improvement" rating in part IV. b. Ammo Chief should be Team Sergeant.		
b. RATER List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade. Team Sergeant <hr/> <hr/> <hr/>			
c. SENIOR RATER Overall performance <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <div style="display: flex; justify-content: space-around; width: 100px;"> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> </div> <div style="display: flex; justify-content: space-around; font-size: 0.7em;"> 1 Successful 2 3 4 Fair 5 Poor </div> </div> <div style="flex: 1; text-align: center;"> <div style="display: flex; justify-content: space-around; width: 100px;"> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> </div> <div style="display: flex; justify-content: space-around; font-size: 0.7em;"> 1 Superior 2 3 4 Fair 5 Poor </div> </div> </div>	d. SENIOR RATER Overall potential for promotion and/or service in positions of greater responsibility. <div style="display: flex; align-items: center;"> <div style="flex: 1;"> <div style="display: flex; justify-content: space-around; width: 100px;"> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> </div> <div style="display: flex; justify-content: space-around; font-size: 0.7em;"> 1 Successful 2 3 4 Fair 5 Poor </div> </div> <div style="flex: 1; text-align: center;"> <div style="display: flex; justify-content: space-around; width: 100px;"> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> <div style="width: 20px; height: 20px; background-color: black;"></div> </div> <div style="display: flex; justify-content: space-around; font-size: 0.7em;"> 1 Superior 2 3 4 Fair 5 Poor </div> </div> </div>		

**This Appendix
Contains**

This appendix contains the items listed in this table--

Title/Synopsis	Pages
SH-1, Advance Sheet	SH-1-1
SH-2, MILPER Message Number 02-114	SH-2-1 to SH-2-3
SH-3, MILPER Message Number 02-122	SH-3-1 and SH-3-2
SH-4, Quarterly NCO-ER Update Sample Bullets	SH-4-1 to SH-4-4
SH-5, Student Notes	SH-5-1 to SH-5-7
SH-6, Practical Exercise 1	SH-6-1 to SH-6-3

Student Handout 1

Advance Sheet

Lesson Hours This lesson consists of two hours of small group instruction and a one-hour practical exercise.

Overview One of the most important forms that you, as a first sergeant, will come in contact with is a DA Form 2166-8, NCO Evaluation Report. The accurate and timely submission of all evaluation reports is important. The purpose of the evaluation report is to support the Army's personnel management program and career development of the soldier. The first sergeant must ensure that NCOs receive accurate and timely reports to help guarantee the selection for promotion, assignment, or schooling of the best-qualified NCOs. The first sergeant plays a critical role in monitoring the NCOERS in the unit. The first sergeant must ensure that the rated soldier receives a fair and accurate report and counseling when required. This lesson will give you the necessary knowledge needed to analyze the NCOERS in the unit. This lesson consists of a before class reading assignment and a classroom discussion.

Learning Objective Terminal Learning Objective (TLO).

Action:	Analyze the NCO Evaluation Reporting System (NCOERS).
Conditions:	As a first sergeant, in a classroom environment, given AR 623-205 and student handouts.
Standards:	Analyzed the NCO Evaluation Reporting System (NCOERS), and pass a scenario based performance examination, to receive a GO (70 percent), you must identify and correct at least 7 of the 10 errors built into items 1 thru 21 of DA Form 2166-8 (NCO-ER), IAW AR 623-205.

- ELO A** Describe the NCO Evaluation Reporting System (NCOERS).
ELO B Describe the policies and procedures for submission of NCO-ERs.
ELO C Explain the rating chain qualifications and responsibilities for NCO-ERs.
ELO D Explain the procedures for appealing an NCO-ER.
ELO E Discuss the evaluation forms and procedures used to evaluate an NCO.
-

Assignment The student assignments for this lesson are:

- Study AR 623-205 Chapters 1 through 6.
 - Scan Student Handouts.
-

Additional Subject Area Resources None

Bring to Class

- Pen or pencil and writing paper.
- All reference material received for this lesson.

Student Handout 2

This student handout contains MILPER Message 02-114 issued 4 Mar 02.

MILPER MESSAGE NUMBER : 02-114
TAPC-MSR
PROCESSING NCO-ERS WITH GAPS IN REPORTING PERIODS
(UPDATE)

1. THIS MILPER MESSAGE WILL EXPIRE NLT 4 MAR 04.
2. REF. AR 623-205.
3. THIS MESSAGE ANNOUNCES PROCEDURAL CHANGES IN THE PROCESSING OF NCO-ERS THAT ARE RECEIVED AT THE U.S. ARMY ENLISTED RECORDS AND EVALUATION CENTER (EREC) WITH GAPS IN THE REPORTING PERIOD. A GAP IN REPORTING PERIOD IS WHEN THE FROM DATE OF THE REPORT RECEIVED IS NOT THE MONTH AFTER THE END DATE OF THE LAST REPORT ON FILE. THIS USUALLY MEANS THAT THERE IS A REPORT MISSING FROM THE FILE. IN THE PAST, EREC WOULD NOT PROCESS ANY SUBSEQUENT REPORTS UNTIL ALL REPORT PERIOD GAPS WERE RESOLVED AND THE RECORD REFLECTS CONSECUTIVE RATING PERIODS. EFFECTIVE WITH REPORTS ENDING IN MARCH 2002 AND LATER, THE FOLLOWING PROCEDURES WILL APPLY AND THEY INCLUDE A NEW REQUIREMENT IN THE PREPARATION OF NCO-ERS AT THE UNIT LEVEL. **THIS APPLIES ONLY TO ACTIVE ARMY REPORTS PROCESSED AT EREC.**
 - A. ALL NCO-ERS WITH THRU/END DATE OF MARCH 2002 AND LATER MUST CONTAIN THE AKO EMAIL ADDRESS OF THE RATED NCO AND THE RATING OFFICIALS. **THE EMAIL ADDRESS FOR THE RATED NCO WILL BE ENTERED ON THE SAME LINE AS THE RATED NCO's NAME ON THE TOP BACK SIDE (PAGE 2) OF THE NCO-ER. AFTER THE NAME (IN ALL CAPS), MOVE FOUR SPACES AND TYPE THE RATED NCO's EMAIL ADDRESS. FOR EXAMPLE: TASMANIAN, DEVIL POODLE devil.p.tasmanian@. SINCE THE LAST PORTION OF ALL AKO EMAIL ADDRESSES ARE THE SAME, THE ONLY PORTION TO BE ENTERED ON THE NCO-ER IS THAT PORTION UP TO THE @ SIGN. THE LAST PORTION OF THE AKO EMAIL ADDRESS (US.ARMY.MIL) WILL NOT BE ENTERED ON THE NCO-ER. THE EMAIL ADDRESSES FOR ALL THREE RATING OFFICIALS WILL BE ENTERED ON THE LAST LINE OF PART IIIId (AREAS OF SPECIAL EMPHASIS). THE DATA WILL BE ENTERED IN THE FOLLOWING MANNER: Rater: andrew.crocodile@. S/R: bobby.meddler@bragg.army.mil; Rev: daryl.seeme@bragg.army.mil. ONLY ONCE SPACE IS NECESSARY BETWEEN ADDRESSES. THE UNIT S1 AND/OR LOCAL/SUPPORTING PSB WILL MONITOR COMPLETED NCO-ERS TO ENSURE COMPLIANCE WITH THIS MESSAGE.**
 - B. WHEN REPORTS ARE RECEIVED AT EREC WITH A GAP IN THE REPORTING PERIOD, THE SUBMITTED NCO-ER WILL BE ACCEPTED FOR PROCESSING/FILING. HOWEVER, AN EMAIL WILL BE PREPARED AND DISPATCHED TO THE RATED NCO AND THE RATING OFFICIALS NOTIFYING THEM OF THE GAP/MISSING REPORT. IT WILL INFORM THE RATED NCO AND RATING OFFICIALS THAT ALTHOUGH THE

REPORT HAS BEEN ACCEPTED FOR PROCESSING, THERE IS A DISCREPANCY IN THE REPORT PERIOD BASED ON THE END DATE OF THE LAST REPORT ON FILE. THE EMAIL WILL ESTABLISH A SUSPENSE OF 30 DAYS FOR THE RATED NCO/RATING OFFICIALS TO RESOLVE THE DISCREPANCY. IF NO RESPONSE IS RECEIVED WITHIN 30 DAYS, A SECOND EMAIL WILL BE PREPARED BUT THIS TIME TO THE INSTALLATION CSM. IT WILL INFORM THE CSM OF THE PREVIOUS EMAIL AND THE COMMAND'S FAILURE TO RESPOND WITHIN THE ESTABLISHED SUSPENSE. THIS EMAIL WILL GRANT AN ADDITIONAL 30 DAYS TO RESOLVE THE REPORT PERIOD GAP. IF IT IS NOT RESOLVED WITHIN 30 DAYS AFTER THE 2D EMAIL NOTIFICATION, THE PERIOD OF THE GAP WILL BE DECLARED NON-RATED TIME ON THE RATED NCO'S OMPF AND NO FURTHER ATTEMPTS TO RESOLVE THE DISCREPANCY WILL BE MADE. HOWEVER, THE LAST REPORT WILL REMAIN ON FILE IN THE OMPF.

4. DIRECT QUESTIONS REGARDING NCO-ER POLICY TO SGM EVERETTE, EVALUATION SYSTEMS OFFICE AT DSN 221-8009, CML (703)-325-8009, OR ANTHONY.EVERETTE@HOFFMAN.ARMY.MIL. DIRECT QUESTIONS REGARDING NCO-ER PROCESSING TO MSG ADAMS, EREC, AT DSN 699-3696, CML (317)510-3696.

Student Handout 3

This student handout contains MILPER Message 02-122 issued 19 Mar 02.

MILPER MESSAGE NUMBER : 02-122
TAPC-MSR
PROCESSING NCO-ERS WITH GAPS IN REPORTING PERIODS
(CLARIFICATION)

1. THIS MILPER MESSAGE WILL EXPIRE NLT 19 MAR 04.
2. REF. AR 623-205.
3. THIS MESSAGE CLARIFIES INSTRUCTION IN MILPER MESSAGE: 02-114. FIRST AND FOREMOST THE GUIDANCE PROVIDED WAS FOR NCO-ERS RECEIVED AT EREC WITH GAPS. THE GAPS REFERRERES TO THE NCO-ERS THAT WERE NOT CHECKED COMPLETELY AND FORWARD TO EREC BEFORE THE PREVIOUS REPORT WAS RECEIVED. THIS MAY HAVE HAPPENED FOR SEVERAL REASONS SUCH AS, CHANGE OF RATER NOT BEING SUBMITTED UPON PCS, NCO-ER RETURNED FROM EREC FOR CORRECTION BUT WAS NOT CORRECTED AND RETURNED, INCORRECT BEGINNING DATE ON THE NEW REPORT, ETC... NO NCO-ER SHOULD KNOWINGLY BE SENT TO EREC WITH A GAP IN REPORTING PERIODS.
4. THE INSTRUCTION FOR THE PLACEMENT OF THE RATER'S, SENIOR RATER'S AND REVIEWER'S E-MAIL ADDRESS IN PART IIID OF THE DA FORM 2166-8 ARE AS FOLLOWS: IF ALL RATING OFFICIALS OF THE NCO ARE ACTIVE DUTY ARMY SOLDIER, THEN ALL E-MAIL ADDRESS WILL BE ENTERED IN THE AKO FORMAT, (AKO ADDRESS UP TO AND INCLUDE THE @ SIGN). IF EITHER OF THE RATING OFFICIALS ARE CIVILIANS OR MEMBERS OF ANOTHER BRANCH OF SERVICE , THEN USE THE INSTALLATION E-MAIL ADDRESS. IF THEY DO NOT HAVE AN INSTALLATION E-MAIL ADDRESS THEN USE WHATEVER E-MAIL ADDRESS THEY HAVE. EXAMPLE OF AN E-MAIL ADDRESS WITH ALL ACTIVE DUTY SOLDIER, (RATER: JOE.BLOW@ S/R: JANE.DOE@ REV: JOHN.D.SMITH@). EXAMPLE OF AN E-MAIL ADDRESS WITH THE SENIOR RATER AS A CIVILIAN OR ANOTHER BRANCH OF SERVICE, (RATER: JOE. BLOW@ S/R: JANE.DOE@BRAGG.ARMY.MIL REV: JOHN.D.SMITH@). THE "REV" IN THE REVIEW'S E-MAIL ADDRESS WILL BE "R" IN UPPER CASE AND "EV" IN LOWER CASE.
5. THE MAJOR REASON FOR THE ORIGINAL MESSAGE WAS TO PREVENT A GAP IN NCO-ER REPORTING PERIOD. TO ENSURE OUR NCOS ARE EVALUATED COMPLETELY AND ACCURATELY IT IS INCUMBENT UPON ALL OF US, THE RATED NCO, THE RATING OFFICIALS, THE PAC AND THE PSB TO CHECK AND DOUBLE-CHECK THE NCO-ER PERIOD OF REPORT PRIOR TO SUBMISSION. **ALL ACTIVE DUTY ARMY NCO-ERS MUST HAVE THE E-MAIL ADDRESS.**
6. DIRECT QUESTION REGARDING NCO-ER POLICY TO SGM HARRISON, EVALUATION SYSTEM OFFICE AT DSN 221-8009, CML (703) 325-8009, OR HARRISOF@HOFFMAN.ARMY.MIL DIRECT QUESTIONS REGARDING NCO-ER PROCESSING TO MSG ADAMS, EREC, AT DSN 699-3693, CML (317) 510-3696.

Student Handout 4

This student handout contains material taken from a Quarterly NCO-ER Update that can be used while preparing an NCO-ER.

BULLET EXAMPLES OF EXCELLENCE

- Major factor behind reenlistment program being best in size category for 7th Sig Cmd
- Mentored two drill sergeants for selection as Battalion Drill Sergeant of the Quarter
- Received Battalion rating of Excellence for OPFOR leader in company field training exercise
- Received ACOE Customer Service Excellence of the Quarter Award.
- Commended by battalion commander as having the best enlisted training program within the battalion
- Selected over 86 SFCs to be the senior instructor of jumpmaster branch
- Coached Service Rifle Team in the winning of the inter-service championships
- Selected for outstanding Public Service of the Year Award
- Achieved three honor platoon awards during rating period
- Selected as Guidance Counselor of the year
- Awarded the Eighth U.S. Army Distinguished Leadership Award by CINC/USFK/CFC/EUSA
- Inspired soldier in her platoon to achieve Soldier of the Year honors
- Authored and completed the Norddeutschland Community Physical Security Plan
- Selected as assistant platoon sergeant over 12 other NCOs
- Took an inherited unsatisfactory section to commendable rating at JRTC
- Trained Ranger Challenge Team to history making first place finish in Bde Ranger Shootout
- Received the Eastern Sector Best MEPS award
- Scored a perfect score of 1000 points on tank table VIII as tank commander
- Helped his clinic win the commander's trophy for APFT excellence for fourth consecutive cycle
- Reduced waiting period for computerized tomography exams from 2 months to 1 day.

BULLET EXAMPLES OF SUCCESS

- Mentorship produced two consecutive MACOM Soldier of the Year winners in USACIDC
- Earned M60 MG master which placed him in top 5 percent of the division NCOs
- Commendable performance as acting commander for a total of three months
- His platoon survival rate for NTC battles was 95 percent--highest in the OPFOR regiment
- Effectively reduced division authorized stockage list with due outs by 8 percent
- Earned recruiter gold badge in less than 12 months
- Received ARCOM for best contact maintenance vehicle during corps logistic inspection
- Outstanding communicator who is a true mentor and counselor for my battery commanders and 1SGs
- Encouraged development of subordinates by allowing mistakes without retribution
- Conducts counseling for personnel evaluations/appraisals in a timely manner
- Provides students the latest course material by devoting after duty hours revising lesson plans
- Trained his soldiers for APFT, CTT, and SQT tasks--all 16 soldiers met Army standards
- Pivotal during the unit pre-deployment CTT training--trained over 10 tasks at company level
- Managed the use of over \$100,000 worth of reprographic equipment without incident

BULLET EXAMPLES JUSTIFYING NEEDS IMPROVEMENT

- Relieved for driving while intoxicated in an off-duty status
- Failed to complete the requirements for the disposition of hazardous materials
- Routinely failed to meet given suspense's and to complete tasks in the prescribed manner
- Failed to account for components of section equipment end items resulting in marginal readiness of equipment
- Failed battalion certification nine times
- Becomes intolerably insubordinate when counseled in regard to corrective criticism
- Failed to maintain consistent progress in weight control program
- Does not respond to correction for uniform and personal appearance
- Relieved for wrongful possession of government property and an illegal substance
- Altered unit record for personal gain
- Participates in horseplay with lower grade enlisted soldiers
- Through his negligence, committed two medication errors within one eight-hour shift
- Used his MOS proficiency to deceive supervisors and subordinates
- Does not set example; frequently late to PT formations

Student Handout 5

This student handout contains note pages to assist the student when taking notes.

TERMINAL LEARNING OBJECTIVE

**Analyze the NCO Evaluation Reporting
System**

U654/OCT03/VGT-1

NCOERS DESIGN OBJECTIVES

- **Strengthen the ability of the NCO Corps to meet the professional challenges of the future.**
- **Ensure the selection of the best qualified NCOs to serve in positions of increased responsibility.**

U654/OCT03/VGT-2

NCOERS DESIGN OBJECTIVES (cont)

- **Contribute to Army wide improved performance and professional development by increased emphasis on performance counseling.**

U654/OCT03/VGT-3

PURPOSE OF DA FORMS 2166-8-1 AND 2166-8

- (DA 2166-8-1) To prepare, conduct, and record performance counseling sessions with rated NCO.
- (DA 2166-8) To provide DA with performance and potential assessments of each rated NCO.
- (DA 2166-8) To ensure sound making of personnel management decisions.

U654/OCT03/VGT-4

COMMANDERS' RESPONSIBILITIES (to establish controls)

- AR 623-205 is available to rated NCO and rating officials.
- Rating chains correspond to the chain of command.
- For all except ARNGUS, official rating chains published and distributed to rated NCO.

U654/OCT03/VGT-5

COMMANDERS' RESPONSIBILITIES (cont)

- For ARNGUS, official rating schemes are published and posted.
- Rating official is fully qualified to meet his or her responsibilities.
- Rating officials give timely counseling.
- Reports are prepared by the rating officials designated in published rating scheme.

U654/OCT03/VGT-6

COMMANDERS' RESPONSIBILITIES (cont)

- Rated NCO provided a copy of completed evaluation report.
- NCOs receive assistance in appeals.
- Reports carefully prepared and submitted on time.
- Performs duties when a report appears illegal, unjust or in violation of this regulation.

U654/OCT03/VGT-7

DELEGATED RESPONSIBILITIES OF THE NCO SUPPORT CHANNEL

- Quality control
- Accuracy
- Submitted on time

U654/OCT03/VGT-8

REPORTS BY CODE AND TYPE

1. First (Does not apply to Active Army)
2. Annual
3. Change of rater
4. Complete the Record
5. Relief for Cause
6. Release from AT/ADT/ADSW/AGR/EAD/TTAD
7. 60-day Rater Option
8. Senior Rater Option

U654/OCT03/VGT-9

PROCEDURES

- **Part I, Administrative Data.**
 - **Part I a,** Name will be capitalized, para 3-7d(1).
 - *Rated NCOs e-mail address on page 2, (SH-2, para 3A.)
 - **Part I h,** Four-digit numerical identifier for the year, para 3-7d(7).
- **Part II, Authentication.**
- **Part III, Duty Description.**
 - **Part III d,** E-mail address of all three rating officials will be entered on the last line, (SH-2, para 3A and SH-3, para 4).

U654/OCT03/VGT-10

PROCEDURES (cont)

- **Part IV, Army Values/Attributes/Skills/Actions.**
 - **Part IV a,** Addition of Army Values
 - **Part IV c,** “Received APFT badge” justifies an excellent rating, para 3-11a.
- **Part V, Overall Performance and Potential.**

U654/OCT03/VGT-11

RATER QUALIFICATIONS / RESPONSIBILITIES

- Immediate supervisor for 90 days
- Sergeant or above and senior
- Counsel rated NCO
- Prepare separate DA Form 2166-8-1
- Assessment of performance
- Prepare fair and correct DA Form 2166-8

U654/OCT03/VGT-12

SENIOR RATER QUALIFICATIONS / RESPONSIBILITIES

- In direct line of supervision for and designated for minimum of 60 days
- Senior to rater by pay grade or DOR
- Obtain NCO's signature on NCOER

U654/OCT03/VGT-13

REVIEWER QUALIFICATIONS / RESPONSIBILITIES

- In direct line of supervision and senior in pay grade or DOR to senior rater
- Ensure rater and senior rater complete the report

U654/OCT03/VGT-14

RC QUALIFICATIONS AND RESPONSIBILITIES

- Rater (Non-AGR) para 4-11 and 5-12
- Senior rater
- Reviewer

U654/OCT03/VGT-15

SCENARIO 1

SGT Smith was due an annual NCO-ER last month. Smith's rater completed the NCO-ER but was relieved prior to signing it. Smith's senior rater and reviewer have been the same during the entire rating period.

U654/OCT03/VGT-16

APPEALS

- **Evaluation reports and appeals**
- **Timeliness**
- **Processing and resolution**
- **Priorities**
- **Burden of proof and type of evidence**

U654/OCT03/VGT-17

Student Handout 6

This handout contains a practical exercise that will be completed in the classroom as part of the lesson.

NCO EVALUATION REPORT For use of this form, see AR 623-205; the proponent agency is CDCSPER						SEE PRIVACY ACT STATEMENT IN AR 623-205, APPENDIX C		
PART I - ADMINISTRATIVE DATA								
a. NAME (Last, First, Middle Initial) SMITH, WILLIAM R.				b. SSN 123-54-9876		c. RANK SSG		
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND CO A, 52D INF (MECH), FT DAISY, CO 79875-0123				d. DATE OF RANK 890401				
				e. PMOSC 11B30				
				g. REASON FOR SUBMISSION 3 ANNUAL				
h. PERIOD COVERED		i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL.	l. RATED NCO COPY (Check one and Date)		m. PSC Initials	
FROM YYYY MM 1992 09	THRU YYYY MM 1993 09	12			1. Given to NCO 2. Forwarded to NCO			
PART II - AUTHENTICATION								
a. NAME OF RATER (Last, First, Middle Initial) WARE, ROCNEY B.				SSN 573-22-1974		SIGNATURE		
RANK, PMOS BRANCH, ORGANIZATION, DUTY ASSIGNMENT SFC, 11B40, Co A, 52D Inf Div (Mech), Platoon Sergeant						DATE		
b. NAME OF SENIOR RATER (Last, First, Middle Initial) BAHM, FREDERICK L.				SSN 359-01-6349		SIGNATURE		
RANK, PMOS BRANCH, ORGANIZATION, DUTY ASSIGNMENT 2LT, IN, Co A, 52D Inf Div (Mech), Platoon Leader						DATE		
c. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating officials in Part II, the duty description in Part III, and the APFT and height/weight entries in Part IV are correct. I have seen the report completed through Part V, except Parts I(d) and I(e). I am aware of the appeals process of AR 623-205.				SIGNATURE		DATE		
d. NAME OF REVIEWER (Last, First, Middle Initial) FRANCO, JOHN A.				SSN 634-23-7519		SIGNATURE		
RANK, PMOS BRANCH, ORGANIZATION, DUTY ASSIGNMENT CPT, IN, Co A, 52D Inf Div (Mech), Commander						DATE		
e. <input type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS <input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL. (See attached comments)								
PART III - DUTY DESCRIPTION (Rater)								
a. PRINCIPAL DUTY TITLE SQUAD LEADER				b. DUTY MOSC 11B40				
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities and dollars) Leads and trains eight soldiers within the 1st squad of the 2nd Platoon; supervises tactical deployment of squad in offensive, defensive, and retrograde operations; coordinates action of squad with adjacent and supporting elements; ensures collection and proper reporting of intelligence data; leads and participates in patrols; supervises various work details.								
d. AREAS OF SPECIAL EMPHASIS Prepare for NCO of the Quarter. Rater: rocney.ware@ S/R: frederick.bahm@ Rev: john.franco@								
e. APPOINTED DUTIES Unit Retention NCO								
f. COUNSELING DATES				INITIAL 920925	LATER 930220	LATER	LATER	
PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)								
a. ARMY VALUES. Check either "YES" or "NO". Comments are mandatory for "No" entries; optional for "Yes" entries.								
<div style="display: flex; flex-direction: column; align-items: center;"> <div style="font-size: 48px; margin-bottom: 10px;">V A L U E S</div> <div style="display: flex; gap: 10px;"> <div style="text-align: right;">Loyalty Duty Respect Selfless Service</div> <div style="text-align: left;">Honor Integrity Personal Courage</div> </div> </div>		1. LOYALTY: Bears true faith and allegiance to the U. S. Constitution, the Army, the unit, and other soldiers.					YES	NO
		2. DUTY: Fulfills their obligations.					X	
		3. RESPECT/EOBEO: Treats people as they should be treated.					X	
		4. SELFLESS SERVICE: Puts the welfare of the nation, the Army, and subordinates before their own.					X	
		5. HONOR: Lives up to all the Army values.					X	
		6. INTEGRITY: Does what is right - legally and morally.					X	
		7. PERSONAL COURAGE: Faces fear, danger, or adversity (physical and moral).					X	
		Bullet comments o extremely honest when dealing with subordinates, peers, and superiors o very competent in job						

RATED NCO'S NAME (Last, First, Middle Initial) + SMITH, WILLIAM R. william.smith@		SSN 123-54-9876	THRU DATE 9309 +
PART IV (Rater) - VALUES/NCO RESPONSIBILITIES <div style="text-align: right; font-size: small; margin-top: -10px;"> <i>Specific Bullet examples of "EXCELLENCE" or "NEEDS IMPROVEMENT" are mandatory. Specific Bullet examples of "SUCCESS" are optional.</i> </div>			
b. COMPETENCE o Duty proficiency; MCS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity; committed to excellence <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div>EXCELLENCE (Exceeds std) <input checked="" type="checkbox"/></div> <div>SUCCESS (Meets std) <input type="checkbox"/></div> <div>NEEDS IMPROVEMENT (Some) (Much) <input type="checkbox"/> <input type="checkbox"/></div> </div>		o enrolled in college courses during off duty time	
c. PHYSICAL FITNESS & MILITARY BEARING o Mental and physical toughness o Endurance and stamina to go the distance o Displaying confidence and enthusiasm; looks like a soldier <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div>EXCELLENCE (Exceeds std) <input type="checkbox"/></div> <div>SUCCESS (Meets std) <input checked="" type="checkbox"/></div> <div>NEEDS IMPROVEMENT (Some) (Much) <input type="checkbox"/> <input type="checkbox"/></div> </div>		APFT PASS 9212	HEIGHT/WEIGHT 66/160 YES o scored a 268 on most recent APFT
d. LEADERSHIP o Mission first o Genuine concern for soldiers o Instilling the spirit to achieve and win o Setting the example; Be, Know, Do <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div>EXCELLENCE (Exceeds std) <input type="checkbox"/></div> <div>SUCCESS (Meets std) <input checked="" type="checkbox"/></div> <div>NEEDS IMPROVEMENT (Some) (Much) <input type="checkbox"/> <input type="checkbox"/></div> </div>			
e. TRAINING o Individual and team o Mission focused; performance oriented o Teaching soldiers how; common tasks, duty related skills o Sharing knowledge and experience to fight, survive and win <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div>EXCELLENCE (Exceeds std) <input type="checkbox"/></div> <div>SUCCESS (Meets std) <input checked="" type="checkbox"/></div> <div>NEEDS IMPROVEMENT (Some) (Much) <input type="checkbox"/> <input type="checkbox"/></div> </div>		o coached squad to receive 100% GO's on common task test	
f. RESPONSIBILITY & ACCOUNTABILITY o Care and maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging soldiers to learn and grow o Responsible for good, bad, right & wrong <div style="display: flex; justify-content: space-between; font-size: x-small;"> <div>EXCELLENCE (Exceeds std) <input type="checkbox"/></div> <div>SUCCESS (Meets std) <input type="checkbox"/></div> <div>NEEDS IMPROVEMENT (Some) (Much) <input checked="" type="checkbox"/> <input type="checkbox"/></div> </div>		o emphasis on safety resulted in zero safety accidents for squad during rating period	
PART V - OVERALL PERFORMANCE AND POTENTIAL			
a. RATER: Overall potential for promotion and/or service in positions of greater responsibility. <div style="display: flex; justify-content: space-around; font-size: x-small;"> <div>AMONG THE BEST <input checked="" type="checkbox"/></div> <div>FULLY CAPABLE <input type="checkbox"/></div> <div>MARGINAL <input type="checkbox"/></div> </div>		e. SENIOR RATER BULLET COMMENTS o shows potential to serve in a more challenging position o recommend attendance at ANCOC as soon as possible o outstanding job as squad leader	
b. RATER: List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade. Operations Sergeant Ammo Chief Platoon Sergeant			
c. SENIOR RATER: Overall performance <div style="display: flex; align-items: center;"> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; font-size: x-small; margin-top: -10px;"> 12345 SuccessfulFairPoor </div>		d. SENIOR RATER: Overall potential for promotion and/or service in positions of greater responsibility. <div style="display: flex; align-items: center;"> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; font-size: x-small; margin-top: -10px;"> 12345 SuperiorFairPoor </div>	